

Feature Films

A Profile of Production

Film
LA







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INTRODUCTION

Feature films are the first form of industrialized mass entertainment, dating back to the beginning of the last century. With an early lead in feature film production, California has historically been home to the greatest concentration of film industry talent in the U.S., as well as an extensive web of ancillary products, infrastructure and services. But these days, California has competition. Production centers across the globe offer U.S. production companies an enticing combination of film incentives, a skilled workforce and available infrastructure. As a result, U.S. feature films are made all over the world.

Among the unique advantages that the film industry provides to local economies are:

1. It is a high-wage industry. A recent report commissioned by the County of Los Angeles revealed that the average wage in the Film and Digital Media Industry in Los Angeles County is \$117,000, which is 95 percent higher compared to the county-wide average of \$59,900.¹
2. The industry supports a creative economy, employing people across a wide-range of skills and trades.
3. The industry generates strong contracting and subcontracting relationships that present opportunities to develop multiple rounds of economic growth and job generation.
4. The industry continues to make efforts to improve its overall environmental footprint.²

According to the Motion Picture Association® (MPA), a major motion picture injects an estimated \$250,000 per day into local economies when shooting on location.³

Film production also stimulates economic development through:

- The provision of materials and supplies
- Increased restaurant and retail revenues
- Future tourism in an area

From a broader economic perspective, movies and TV shows are the largest cultural export in the U.S.⁴ The U.S. exports nearly four times the amount of film and television products than it imports, resulting in a trade surplus.⁵ Film production therefore plays a vital role in California's economy and an increasingly important role in other jurisdictions, as they compete to become production centers for U.S.-based productions.

1 Beacon Economics, *Film and Digital Media Industry: Los Angeles County Perspective*, p. 7.
<http://file.lacounty.gov/SDSInter/bos/supdocs/128694.pdf>

2 Motion Picture Association, "Major Film and Television Studios Expand Sustainability Efforts; Donate Over 130,000 Meals in 2018," April 22, 2019.
<https://www.motionpictures.org/press/major-film-and-television-studios-expand-sustainability-efforts-donate-over-130000-meals-in-2018/>

3 Motion Picture Association.
<https://www.motionpictures.org/what-we-do/driving-economic-growth/>

4 Other cultural export products include manufactured jewelry and silverware, arts-related software publishing, sound recording, creative advertising, architectural and design services, book, periodical and newspaper publishing, as well as performing arts and work by independent artists.

5 National Endowment for the Arts: Office of Research and Analysis. "ACPSA Brief #5: Imports and Exports of Arts and Cultural Goods and Services." January 2015.

PURPOSE OF THE REPORT

For several years, FilmLA's annual Feature Film Study has profiled the 100 top-grossing domestic feature films ("top-grossing") at the U.S./Canada box office to determine where they were filmed, how much was spent to produce them, and what percentage of the budget was spent locally. The majority of these top-grossing films were studio-produced, high-budget projects, including animation and special effects (VFX)-driven films.

In this report, our objective is to provide a fuller picture of filming locations utilized in the production of all feature films, not just top-grossing films. The focus of this study is U.S.-produced, live-action, English-language features ("narrative features"), excluding animation, documentaries, foreign films, student films and shorts. This analysis is based on the locations and jurisdictions used for principal photography, which may differ from locations used by VFX and post-production work.

FilmLA counted the filming locations for U.S. narrative films released theatrically in 2018, as well as original, feature-length movies released by the major streaming platforms—Netflix™, Amazon®.

RESEARCH METHODOLOGY

Feature films can utilize a variety of locations across multiple jurisdictions (cities, states and nations) during production. This is especially true of higher-budget projects, which might build extensive sets on a sound stage, in addition to filming scenes on location across the globe. For example, the top-grossing feature of 2018, *Black Panther*, was filmed in North America, Asia, South America and Africa, in addition to using studio facilities in New York City and Atlanta.⁶

In some instances, a feature film project can film in one jurisdiction, which makes the determination of the filming location simple. For example, the 2018 release, *Book Club*, was filmed in various locations throughout Los Angeles County and did not shoot outside the region.

Other projects will film in other domestic or international locations and return to California for reshoots. This was the case for the 2018 release, *Blockers* (filmed primarily in Georgia but returned to Los Angeles County for a one day reshoot), *The Nun* (filmed primarily in Romania), and *A Quiet Place* (filmed primarily in New York State).

In researching the locations of several hundred films, the determination of the percentage of principal photography or number of shoot days for each jurisdiction is beyond the scope of this analysis. The reasons for this mostly include, but are not limited to, the fact that such data was either not available from domestic and global film commissions or from the individual production companies that produced these films. As such, FilmLA's research counted all known jurisdictions where a feature film conducted principal photography. Outside of California, FilmLA utilized available jurisdictions data from secondary sources such as the databases, Studio System® and IMDbPro®.

⁶ IMDbPro. <https://pro.imdb.com/title/tt1825683/details>



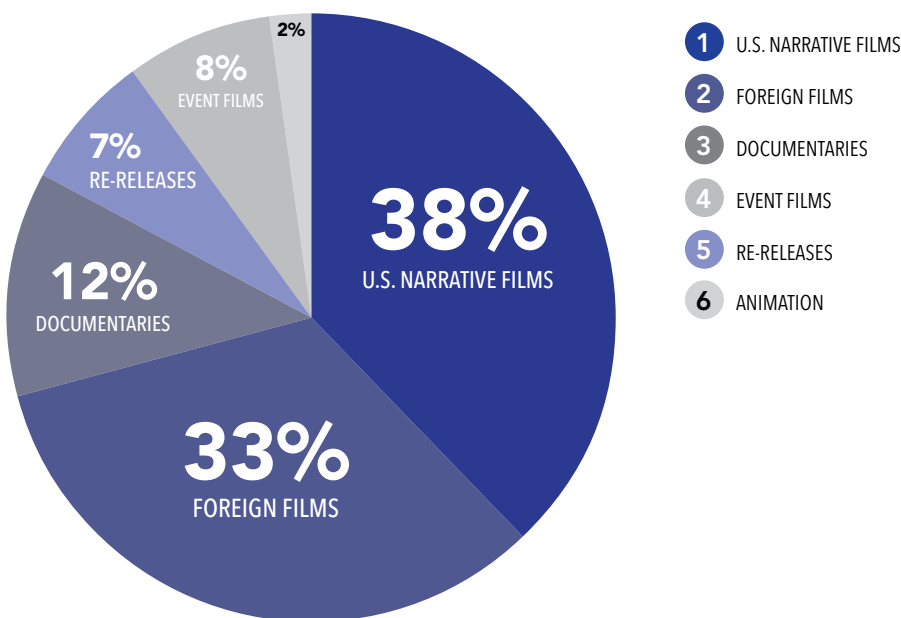
2018 FILMING LOCATION ESTIMATES

FEATURE FILMS WITH THEATRICAL RELEASES

Based on data from the Motion Picture Association (MPA), a total of 758 feature films were released in theaters in the U.S./Canada in 2018.⁷ This count includes films that were released on at least one screen and whose distributors reported box office grosses.

To ascertain the number of narrative features, FilmLA subdivided these 758 films into the following six categories: (1) 291 narrative features of U.S. origin⁸, which are the focus of this research; (2) 250 foreign films;⁹ (3) 91 documentaries; (4) 62 "event" films;¹⁰ (5) 49 re-releases; and (6) 16 animated films.

FEATURE FILMS RELEASED THEATRICALY: 2018



The following should be noted about the 291 studied films:

- This sample includes features released theatrically in 2018 where box office grosses are reported, and not the year of production. For example, a film may have been shot in 2016 or 2017 and then distributed in theaters in 2018.
- If a feature was filmed in several locations in the same state, province or country, that jurisdiction was only counted once. For example, a film that utilized locations in Los Angeles, San Francisco, and Central California, would only be counted once, for California.

7 Motion Picture Association. "2018 THEME Report." p. 17.

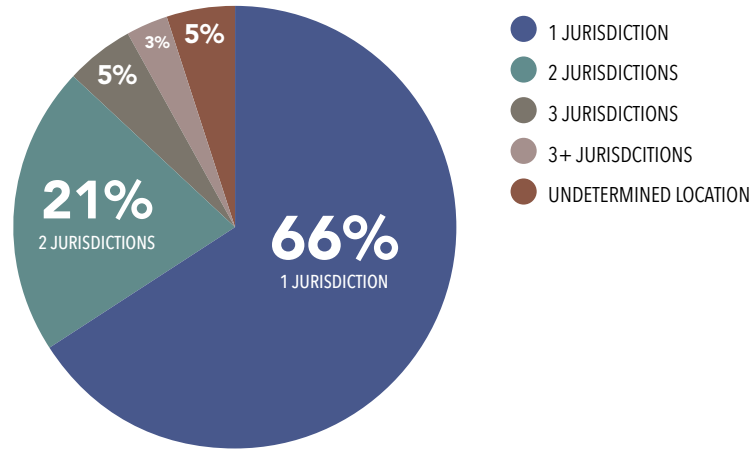
8 **NOTE:** Films of U.S. origin include co-productions, provided they are English-language projects.

9 **NOTE:** For purposes of analysis, any film in a foreign language was categorized as a "foreign film" regardless of genre (i.e., documentary, animation, etc.). Many foreign films typically play on only several screens in major markets like Los Angeles or New York, which likely explains their high number.

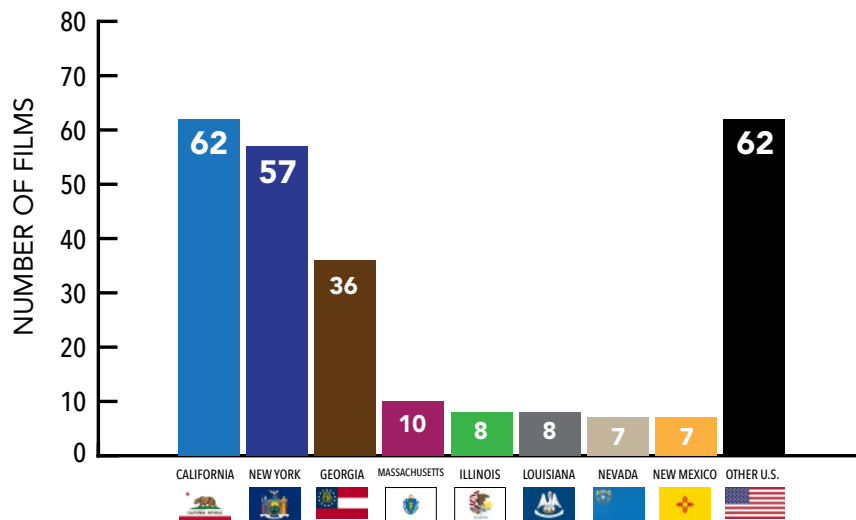
10 **NOTE:** An "event film" is defined as a live screening at a theater of an event such as a performing arts events (i.e., live ballet, opera, etc.) or sporting match (i.e., boxing, etc.).

Based on FilmLA's analysis, the 291 projects under study filmed in at least 415 total locations across the globe, equating to an average of 1.4 per film. Approximately two-thirds or 66 percent of these projects were filmed in one jurisdiction, 21 percent in two, 21 percent in two, and 5 percent in three. Only 3 percent of these studied projects filmed in more than three jurisdictions.

NUMBER OF FILMING JURISDICTIONS, PER FILM: 2018



DOMESTIC JURISDICTIONS FOR THEATRICAL FEATURES: 2018



By FilmLA's count, a total of 257 domestic locations were used for the 291 studied films, representing 61.9 percent of the total worldwide. California locations were used in 62 films, followed by New York (57), Georgia (36), Massachusetts (10), Illinois (8), Louisiana (8), Nevada (7) and New Mexico (7).

A total of 36 U.S. states were the filming locations for one or more of these domestic features, which explains the high number (62 total) for the "All Other U.S. States" category.¹¹

¹¹ **NOTE:** This includes the 8 states listed in the graph, plus an additional 28 states that fell into the "All Other U.S. States Category."

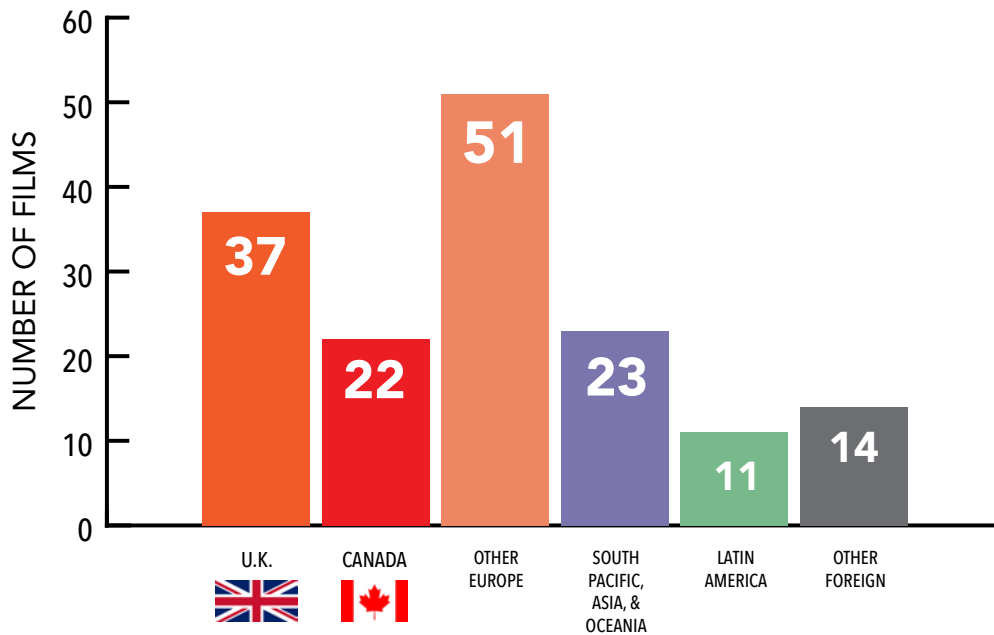
FEATURE FILMS WITH THEATRICAL RELEASES (CONTINUED)

The fact that so many features filmed throughout the U.S., with California, New York and Georgia being the most popular domestic centers, illustrates the diversity of domestic filming locations and mobile nature of film production. Today, many U.S. states and jurisdictions outside the U.S., most notably the U.K. and Canada, offer tax incentives¹², crew depth and infrastructure to capture film and television production.

Looking at international jurisdictions used by sampled films, FilmLA counted 158 locations—38.1 percent of the total. Although the U.K. stood out as the one dominant international jurisdiction (37 films), followed by Canada (22 films), many films shot on location throughout Europe's other 44 countries (53 total). Though too numerous to list individually, popular filming locations in Europe outside the U.K. included France (8 films), Italy (7), Germany (5) and Hungary (4). Together, these four countries accounted for nearly half of this "Other Europe" category. In recent years, many countries in Eastern and Central Europe have also established tax incentives to attract U.S. production.

12 A complete list of Global Film Production Incentives can be found on the following link:
<https://www.o-spi.co.uk/wp-content/uploads/2019/06/Olsberg-SPI-Global-Incentives-White-Paper-Final-2019-06-04.pdf>

INTERNATIONAL JURISDICTIONS FOR THEATRICAL FEATURES: 2018



ORIGINAL FEATURE FILMS ON STREAMING

The distribution of feature films is no longer limited to movie theaters. Today, feature length films are also being made specifically for television distribution on streaming platforms. The modes of production are the same, but the distribution patterns are changing. Streaming giants such as Netflix and Amazon have transitioned from movie distributors to movie makers. Netflix started the trend in 2015 with their first original movie, *Beasts of No Nation*, which was made for a reported budget of \$6 million.¹³ That same year, Amazon Studios bought the rights to Spike Lee's film, *Chi-Raq*, which it distributed on its platform.

What is noteworthy about streaming movies is that: (1) their numbers are growing substantially as these services increase their content libraries to attract viewers; and (2) many of these movies have sizeable budgets in excess of \$100 million. For example, last year it was reported that Michael Bay's *6 Underground* for Netflix had a budget in the \$150 to \$170 million range.¹⁴ Martin Scorsese's Netflix feature, *The Irishman*, also had a reported budget of \$160 million.¹⁵ Simply put, in terms of content, the distinction between the "big screen" and the "small screen" is fading.

If a movie made by a streaming service is released in theaters, it is often for a limited duration. For example, Amazon's recent original film, *The Report*, was released theatrically two weeks before it was available to stream, following a similar pattern that Netflix set for *Roma* last year.¹⁶ Most features made by the streamers bypass a theatrical release entirely. An exception is typically when they are up for award consideration, in which case a theatrical release is necessary.

In terms of volume, the Netflix film division is set up to supply 55 original films annually, excluding documentaries and animated movies, with budgets as high as \$200 million.¹⁷ Amazon Studios also recently announced its intention to release 30 movies annually starting in 2020.¹⁸ The output of original movies for these two streaming giants is comparable to the collective number of annual films released by the major studios.

Newer streaming services such as Disney+[®] and Apple TV+[®], both of which were launched in November 2019, will soon be joined by HBO Max[™] (WarnerMedia[®]), NBCUniversal's[®] Peacock[™], and Quibi[®] (short-form) in 2020. All of these services have indicated that they plan to make both original movies and TV series, though the mix of theatrical releases versus sole streaming distribution varies by company. Amazon, for instance, recently changed its strategy to release more movies on its platform versus in theaters, while Apple TV+ recently announced plans to bring feature-length films to theaters.¹⁹

13 Per IMDbPro. <https://pro.imdb.com/title/tt8236336/details>

14 Brandon Katz, "'6 Underground' Marks the Arrival of Netflix's Blockbuster Era," *Observer*, December 13, 2019. <https://observer.com/2019/12/netflix-6-underground-budget-ryan-reynolds-salary-michael-bay-upcoming-movies/>

15 Graham Winfrey, "Martin Scorsese on the Most Expensive and Ambitious Experiment of His Career—and Why He Took It to Netflix," *Inc.* September 27, 2019. <https://www.inc.com/graham-winfrey/martin-scorsese-the-irishman-netflix-robert-de-niro-al-pacino.html>

16 Matt Donnelly, "Amazon's Awards Hopeful 'The Report' Hitting Prime Two Weeks After Theatrical Debut," *Variety*, June 13, 2019. <https://variety.com/2019/film/box-office/the-report-september-release-adam-driver-1203242051/>

17 Brook Barnes, "Netflix's Movie Blitz Takes Aim at Hollywood's Heart," *The New York Times*, December 16, 2018. <https://www.nytimes.com/2018/12/16/business/media/netflix-movies-hollywood.html>

18 Nicole Sperling, "Behind Amazon's Abrupt Change in Its Film Strategy," *The New York Times*, October 9, 2019. <https://www.nytimes.com/2019/10/09/business/media/amazon-studios-movie-releases.html>

19 Tripp Mickel and Erich Schwartzel, "Apple Plans to Bring Feature-Length Films to Theaters," *The Wall Street Journal*, September 27, 2019. <https://www.wsj.com/articles/apple-plans-to-bring-feature-length-films-to-theaters-11569579632>



ORIGINAL FEATURE FILMS ON STREAMING (CONTINUED)

Based on the streaming service websites and IMDbPro, FilmLA counted a total of 56 original movies that were released in 2018 by the two streaming giants – Netflix and Amazon.²⁰ Our count includes only those narrative movies that were U.S.-produced, English-language features that were released exclusively on their streaming platforms.²¹ These 56 projects filmed in a total of 30 jurisdictions (14 U.S. states and 16 countries) and 75 locations,²² which represents an average of 1.3 locations per film.

Utilizing the same methodology for the 291 narrative features in 2018 (counting each filming location used), New York was the filming location for the highest number of streaming originals, hosting 13 original films that were released in 2018 (23.2 percent of originals), followed by California with 11 films, and Canada with 10. This may explain Netflix’s decision to build a production hub in Brooklyn.²³

Similar to theatrical releases, the remainder of the individual locations were spread throughout the U.S. and globe, illustrating the diversity of filming locations for the streaming giants. Though the number of original streaming films was small in 2018 compared to films in theatrical release (56 vs. 291), this is the fastest growing segment of movie production.

With more original movies being made by upcoming streaming platforms next year, it can be assumed that this number will increase substantially next year from its 2018 count of 56 films. Another assumption is that few, if any, of these projects will be counted in theatrical releases since most of these projects may skip a theatrical release entirely.




20 **NOTE:** Hulu issued four, feature-length episodes of a horror anthology series, Into the Dark, which IMDbPro lists as a “television series.”

21 **NOTE:** Two of Amazon’s original films – Beautiful Boy and Don’t Worry, He Won’t Get Far on Foot – were also released theatrically and were therefore previously counted as theatrical releases.



22 **NOTE:** Filming locations were not available for two original streaming films.

23 Todd Spangler, “Netflix to Open Production Hub, Expand Offices in New York City,” *Variety*, April 18, 2019. <https://variety.com/2019/digital/news/netflix-production-hub-new-york-city-1203192541/>

ORIGINAL STREAMING MOVIES (2018) DOMESTIC FILMING LOCATIONS

PRODUCTION CENTER	NUMBER OF FILMS
 New York	13
 California	11
 Georgia	3
Colorado	2
Illinois	2
Louisiana	2
Massachusetts	2
Arizona	1
Connecticut	1
Hawaii	1
Nebraska	1
New Mexico	1
North Carolina	1
Rhode Island	1
Total Domestic	42

ORIGINAL STREAMING MOVIES (2018) FOREIGN FILMING LOCATIONS

PRODUCTION CENTER	NUMBER OF FILMS
 Canada	10
 U.K.	4
Serbia	3
Mexico	2
Romania	2
Spain	2
Caribbean	1
Croatia	1
Germany	1
Iceland	1
Italy	1
Japan	1
Morocco	1
Netherlands	1
Norway	1
South Africa	1
Total Foreign	33

CHARACTERISTICS OF MAJOR FILMING CENTERS

Examining all filming locations for the studied 291 films released in 2018, FilmLA’s research revealed that five jurisdictions—California, New York, the U.K., Georgia and Canada—were used as filming locations for 73.5 percent of those films. This means that roughly three-quarters of narrative features filmed part, if not the entirety, of their projects in one of these five centers. Film production is a global business, with scenes from films filmed throughout the world, but these five centers dominate. The common denominator among them is their competitive tax credits, crew depth, and existing infrastructure, particularly available sound stages.

Feature films tend to be heavy users of stage space because sound proofing, space for set construction, high ceiling heights, available power, parking, office space and other amenities are available on studio campuses.







But in recent years, the proliferation of television series has created a “space race” for available stages. FilmLA research’s Sound Stage Production Report, released in 2016, sheds some light on this phenomenon.²⁴

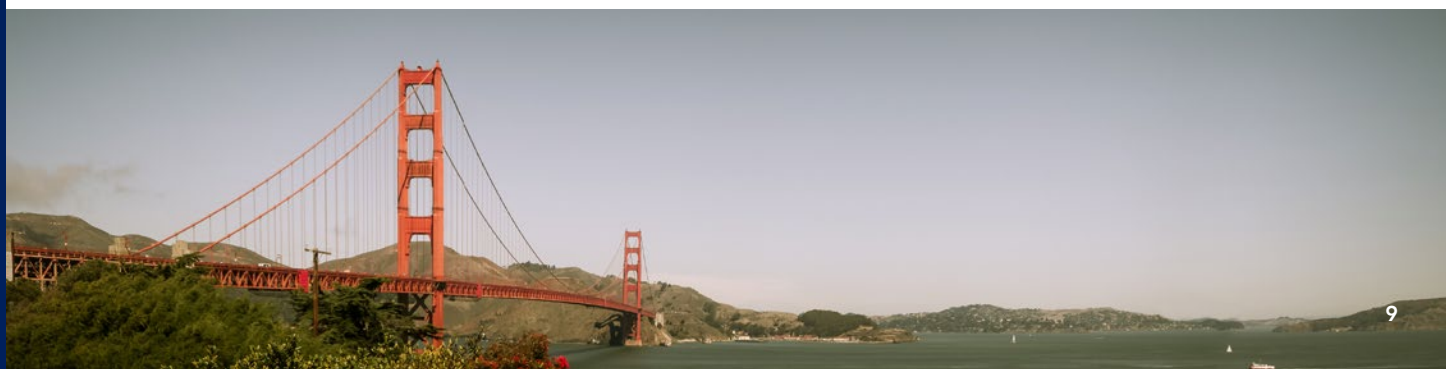
The fact is that today, feature films and television productions are now competing for the same resources. To meet this increased demand, a recent phenomenon among studios/production companies includes them either: (1) taking over long-term leases on existing sound stages; (2) constructing new, purpose-built stages for their own productions; or (3) buying existing studio facilities in which to film their own productions. This is unprecedented since in the past production companies would rent out third-party facilities or available warehouses.

The following is a more in-depth discussion for each of the five competitive jurisdictions, including filming by region, capture of the year’s top-grossing projects (a subset of the 291 features), tax incentives and available sound stage space.

²⁴ FilmLA. Sound Stage Production Report. <https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>

CHARACTERISTICS OF COMPETITIVE JURISDICTIONS: 2018

		 CALIFORNIA	 NEW YORK	 UNITED KINGDOM	 GEORGIA	 BRITISH COLUMBIA	 ONTARIO
FEATURE FILMS	THEATRICAL FEATURES	62	57	37	36	16	4
	STREAMING FEATURES	11	13	4	3	3	2
	TOTAL FEATURES	73	70	41	39	19	6
SQUARE FOOTAGE OF EXISTING STAGES		5.2 million	1.8 million	3.5 million	2 million	2.5 million	2.3 million
TAX CREDIT CHARACTERISTICS	TAX CREDIT AMOUNT (FEATURES)	20% (non-indie); 25% indie	30%	25%	20%	28%	21.5%
	CREDIT TYPE	Non-transferable (non-indie); Transferable (indie)	Refundable	Cash Rebate	Transferable	Refundable	Refundable
	SUNSET DATE	2025	2022	None	None	None	None
	ANNUAL CAP (U.S. \$)	\$330 million	\$420 million	None	None	None	None





California is home to the major Hollywood studios, in addition to the production headquarters for the newer major streaming companies, with the exception of NBC Universal's Peacock.^{25,26}

As the historic number one global production center, California served as the most frequent filming location for narrative films that were released in 2018.

The Golden State hosted a total of 62 films released in 2018, meaning that 21.3 percent of all narrative features released last year filmed for at least a day in the Golden State. However, the proportion of budget spent and shoot days in California, or any jurisdiction for that matter, is not quantifiable.

Appendices A and B list information for California film projects, including filming locations and shoot days, when available. FilmLA utilized permitting data, in addition to information from the California Film Commission and Film Liaisons in California, Statewide ("FLICS") in assessing these characteristics. Every reasonable effort was made to obtain data directly from film commissions handling permitting for each jurisdiction or the production companies themselves.²⁷

FILMING BY REGION IN CALIFORNIA

The number of features that are filmed in California is almost evenly split between those that shoot entirely in-state and those that shoot both locally and outside the state and/or country.

For the 62 narrative features that filmed in California:

- Thirty-two reportedly filmed entirely in the Golden State, representing 51.6 percent of all films (**Appendix A**). Based on FilmLA estimates, those 32 projects that filmed entirely in-state generated an average 25 Shoot Days for principal photography, hired 100 crew, 30 cast and generated an additional 1,285 extras/stand-in man days.^{28,29}
- The remaining 30 features (48.4 percent) filmed their projects in-state, as well as other locations—both domestically and internationally (**Appendix B**). The number of shoot days ranged from a total of one day for reshoots to 80 days for *A Wrinkle in Time*. Among the additional 44 locations for these films, 18 were international (40.9 percent) and 26 were domestic (59.1 percent).
- Los Angeles County has historically been the epicenter of production in California. The county accounted for 38 of all 62 projects (61.3 percent) that filmed all or a portion of their project in the state. For example:
 - Thirteen of all projects shot in California (20 percent) filmed in Los Angeles County and other jurisdictions, either domestically or internationally (Appendix B).
 - Eleven projects (17.7 percent) were filmed entirely outside of Los Angeles County. Features that filmed outside of Los Angeles include *Alpha* (San Bernardino County), *American Dresser* (Kern and Ventura Counties), *Ant-Man and the Wasp* (San Francisco and Alameda Counties), *Blindspotting* (Alameda County), *The Endless* (San Diego County), *An Evening with Beverly Luff Linn* (Humboldt County), *Searching* (San Jose County), *Sorry to Bother You* (Alameda County), *Traffik* (El Dorado and Ventura Counties), *Venom* (San Francisco County) and *Winchester* (Alameda County). Six of these movies – *Blindspotting*, *The Endless*, *An Evening with Beverly Luff Linn*, *Searching*, *Sorry to Bother You* and *Traffik* shot entirely in California.

In summary, 81.3 percent of features filmed in California shoot at least a portion of their project, if not the entirety, in Los Angeles County.

25 **NOTE:** Peacock is NBCUniversal's upcoming streaming service being launched April 2020 that is headquartered in New York City.

26 **NOTE:** Current streaming companies include Netflix, Amazon, Hulu, Disney+ and Apple TV+. Upcoming streaming companies in 2020 include HBO Max, Peacock and Quibi.

27 Location information for the projects analyzed here, while robust, may not be exhaustive. Differences in film permit requirements and inconsistent recordkeeping across jurisdictions, plus widespread industry use of working titles complicated our quest for location data.

28 A "man day" is defined as the sum of the number of days, full or partial, a person is estimated to work as an extra/stand-in. This therefore does not quantify as the number of unique individuals/extras since the same person might work multiple days on a production.

29 This information is likely conservative based on the fact that: (a) some information is incomplete since FilmLA was unable to obtain it from the respective film commissions and/or individual production companies; and (b) this data pertains to principal photography days only and does not include pre-production or post-production activity. In other words, total shoot days and crew employment figures are likely higher.



TOP-GROSSING FILMS MADE IN CALIFORNIA

California has been losing its market share of top-grossing films³⁰ for nearly two decades now. The majority of top-grossing films tend to be higher-budget projects that generate a substantial economic impact. According to a 2014 report in *The Los Angeles Times*, the number of top-grossing films made in California dropped 60 percent in the 15 years prior.³¹ A list of the top production centers that served as the primary filming location for top-grossing films released in recent years appears in **Appendix C**. A map illustrating the primary filming jurisdictions for all of the top-grossing films follows in **Appendix D**.

The advent of runaway production for feature films dates back to the late 1990s when the Canadian federal and provincial governments began offering film incentives to entice filmmakers away from California. Other U.S. states followed suit and began offering a combination of tax incentives, trained crew members and stage space. In fact, Louisiana captured the highest share of top-grossing films in 2013. In 2017, Canada was the filming location for the highest number of top-grossing films, Georgia held that position in 2016, the U.K. in 2015, and California in 2014.³²

In 2018, a total of 11 projects that filmed primarily in California were top-grossing films (**Appendix C**), representing 17.7 percent of the 62 features. These top-grossing films include *Book Club*, *Breaking In*, *Bumblebee*, *The Happytime Murders*, *Insidious: The Last Key*, *Peppermint*, *Searching*, *A Star is Born*, *Truth or Dare*, *Vice* and *A Wrinkle in Time*.

30 **NOTE:** Top-grossing films" refer to the top 100 grossing films at the North American box office in 2018. This data was extracted from movie industry database, The Numbers, on September 2, 2019.

31 David Horsey, "Runaway Production Leaves California in the Lurch," *The Los Angeles Times*, January 8, 2014. <https://www.latimes.com/entertainment/envelope/la-xpm-2014-jan-08-la-et-ct-horsey-runaway-production-20140108-story.html>

32 FilmLA, 2017 Feature Film Study, p. 4. https://www.filmla.com/wp-content/uploads/2018/08/2017_film_study_v3-WEB.pdf

FILM TAX CREDIT PROGRAM IN CALIFORNIA

California's Film & TV Tax Credit Program ("CFTTC") commenced in 2009 (Program 1.0) with \$100 million in fiscal year funding. Due to the modest success of the program to retain and attract productions and to increase global competitiveness, a bill was passed in 2014 to initiate Program 2.0, a \$1.55 Billion dollar tax credit program over five years.

In 2018, with support from industry labor groups and legislators, California Gov. Jerry Brown extended the tax credit program for five years beyond its 2020 expiration to 2025. Program 3.0 continues to offer a 20 percent non-transferable tax credit for feature films ("non-indies") and a 25 percent transferable tax credit for independent films ("indies"). The annual cap remains at \$330 million. Both types of features must have a minimum budget of \$1 million to qualify.

Non-indies currently receive an additional 5 percent tax credit for principal photography done outside of the 30-mile zone,³³ music scoring and recording in the state and for qualified visual effects expenditures. The new program will offer an additional uplift for local hire labor, which applies to individuals who reside in California (outside of the Los Angeles zone) who perform services outside of the Los Angeles zone. Non-indies will receive an additional 10 percent tax credit while indies receive a 5 percent uplift for local hire labor. Program 3.0 will also provide additional bonus points (to increase jobs ratios, a key measure of job creation) for projects that engage musicians for music scoring, incur visual effects expenditures, and shoot out of the zone.

33 The 30-mile zone, or studio zone, consists of a radius used by union film projects. The center of the zone is situated at the southeast corner of Beverly and La Cienega Boulevard in Los Angeles.

CALIFORNIA TAX CREDIT RECIPIENTS

In 2018, a total of 14 film projects received the tax credit. This includes 12 theatrical release films and two that were released on streaming platforms. The 12 films in theatrical release, which consisted of six indies and six non-indies, generated \$375 million in qualified spend and hired 1,963 crew, 835 cast and generated 23,405 man days for extras/stand-ins (**Appendix E**).

Two additional features that were released by Netflix in 2018 specifically for their streaming platform—*Bird Box* and *The Cloverfield Paradox*—also received the CFTTC. These two projects generated additional spend of approximately \$39.1 million, 81 shoot days, 213 cast, 382 crew and 1,844 man days for extras.

In summary, combined total qualified spending in California from tax credit films for both theatrical (12 count) and streaming releases (2 count) was approximately \$414.1 million for features released in 2018. Together, these 14 projects generated 645 Shoot Days and employed 2,335 crew, 1,048 cast and 25,249 man days for extras.

Looking at California locations of all 14 CFTTC recipient projects, only five—*Book Club*, *The Cloverfield Paradox*, *The Happytime Murders*, *Hotel Artemis* and *Peppermint*—were shot entirely in the Los Angeles County region.

Among the remaining nine films, the additional filming locations are as follows:

- *Beautiful Boy* and *Bumblebee* were filmed primarily in Northern California
- *A Wrinkle in Time* filmed additional locations in Humboldt County
- *Destroyer* and *A Star is Born* filmed additional locations in Riverside County
- *Don't Worry, He Won't Get Far on Foot* was based and set in Portland, Oregon, but filmed in the Greater Los Angeles area
- *Vice* shot additional scenes along the Kern River (Kern County) and Thousand Oaks (Ventura County)
- *Unbroken: The Path to Redemption* shot locations in Ventura County (Oxnard)
- *Bird Box* shot additional locations in Del Norte (Smith River) and San Bernardino (Claremont), and Santa Cruz counties

The fact that most of the incentivized features shot outside the Greater Los Angeles region attests not only to the diversity of California locations, but to the impact of the CFTTC's regional bonus on location selection.

Location saturation may be another factor, particularly in Los Angeles, where space demands for film and television projects is so strong that it is driving productions to other counties statewide.³⁵ As shown in **Appendix E**, the average incentivized feature filmed in eight different locations.

AVAILABLE STAGE SPACE IN CALIFORNIA

One of the issues facing the state is the lack of available sound stage space. Los Angeles County is home to the world's largest concentration of dedicated, certified sound stage space at 5.2 million square feet. There are also several additional adaptive reuse facilities and some smaller stages in the Bay Area.

In FilmLA's most recent Sound Stage report, participating partners reported average annual occupancy of 96 percent, with one-hour and half-hour television series commanding 75 percent of all booked stage days.³⁶ The proliferation of television projects in the Greater Los Angeles area and their demand for stage space, has limited the availability of sound stages for both film and television projects.

The Bay Area in Northern California has also two adaptive reuse facilities that are used for filming—Mare Island with 200,000 square feet of sound stage space, and the recently reopened Treasure Island Hangar 3, which is 79,000 square feet. Both facilities are currently occupied with productions. Mare Island is also in the process of adding 5 certified sound stages.

In recent years, there have been a few new additions to the supply of studio space in Los Angeles County. New studios that opened in 2019 include Quixote Studios, a purpose-built, five-stage complex with 75,000 square feet in Pacoima, and L.A. North Studios, an adaptive reuse of a former warehouse in Santa Clarita with four stages and 125,000 square feet. In 2018, Crimson Studios in Chatsworth opened with five stages and 40,000 square feet. A new studio in Sun Valley—Line 204—has also been approved for a new 240,000 square-foot studio, including 10 stages.

Since a significant portion of the stage space in Los Angeles County was built in the earlier part of last century, the region is also lacking a number of stages in excess of 30,000 square feet, which are often used as a base for big-budget, special effects-driven films.

35 Randy Drummer, "Shortage of Studio Space Drives Productions to Far-Flung Parts of Los Angeles County," CoStar News, August 16, 2019. <https://product.costar.com/home/news/shared/462307583>

36 FilmLA. Sound Stage Production Report. <https://www.filmla.com/wp-content/uploads/2017/11/sound-stage-study-v3-WEB.pdf>

NEW YORK

The state of New York was the filming location for 57 narrative films released last year (19.6 percent) and 13 streaming films (23.2 percent) in 2018. Based on locations information from the databases Studio System and IMDbPro, 35 of the 57 film projects in 2018 (61.4 percent) filmed entirely in the Empire State. This compares to 51.6 percent of films shot entirely in the state of California.

TOP-GROSSING FILMS MADE IN NEW YORK

A total of seven films that shot primarily in New York—12.2 percent—were top-grossing films in 2018. These include *BlackKkKlansman*, *The First Purge*, *The Greatest Showman* (2017), *Ocean's 8*, *The Post* (2017), *A Quiet Place* and *Second Act*.

Other top-grossing films that shot scene(s) or locations in New York include *Avengers: Infinity War*, *Black Panther*, *Green Book*, *A Simple Favor* and *Venom*.

FILM TAX CREDIT PROGRAM IN NEW YORK

New York enacted film incentives in 2004. The state's current program provides a 30 percent refundable tax credit that is capped at \$420 million annually. Qualified productions of more than \$15 million ("Level 2" productions) must also utilize a "qualified production facility" to be eligible and shoot at least 10 percent of principal photography days at such a facility. The state also offers a 10 percent bonus for labor costs on projects shot in upstate New York. Examples of 2018 films that shot upstate include *Ben Bread Factory, Part One* (Columbia County), *The First Purge* (Buffalo), *Foxtrot* (Syracuse), and *Tyrell* (Catskills).

AVAILABLE STAGE SPACE IN NEW YORK

New York currently has 1.8 million square feet of dedicated stage space.³⁷ The largest facility—Steiner Studios in the Brooklyn Navy Yard—was built in 2004 with 21 stages and approximately 258,000 square feet of space. York Studios was built more recently (2012) in Queens (1 stage) and the Bronx (5 stages).

Recently announced studio developments include a proposed \$425-million studio in Queens, Lionsgate's planned facility in Yonkers, and Netflix's construction of six stages (currently underway) in the Bushwick section of Brooklyn as part of their new production hub in New York.

If these three projects are built, they will add nearly 900,000 square feet to the state's current supply of approximately 1.8 million square feet of stage space. This would bring the state's total to approximately 2.7 million square feet of dedicated stage space.

³⁷ Empire State Development, *Sound Stage Directory*.
<https://esd.ny.gov/soundstage-directory>



THE U.K.

As the top foreign jurisdiction to host U.S. feature films, the U.K. hosted 37 of the 2018 theatrical releases—12.7 percent of all narrative features—and four original streaming movies. The region has historically been a major filming center for high-budget, U.S. studio-backed features and co-productions due to its uncapped film incentive program, skilled crews and availability of large production facilities and sound stages. According to the British Film Institute, foreign/"inward" investment for feature films in the U.K. comprised approximately £1.75 billion (approx. US \$2.3 billion). This represents an astounding 87.4 percent of feature film spend in 2017.³⁸

More recent events that enhance its position as a major production center for U.S. companies include the weakening of the British pound due to concerns regarding Brexit. As further examples of the U.K.'s attraction for U.S. studios, both Netflix and Disney recently negotiated long-term leases at Pinewood Shepperton and Pinewood studios—the two largest studio facilities in the U.K.

Based on locations information from the databases Studio System and IMDbPro, England is the primary filming destination among the four nations that make up the U.K. Among the 37 features released in 2018, a total of 32 projects (86.4 percent) shot there.

The number two filming location was Scotland, which hosted three of the 2018 features—*Avengers: Infinity War*, *Mary Queen of Scots*, and *The Wife*. Northern Ireland hosted one film, *Mary Shelley*, and Wales was the filming location for *Show Dogs*.

TOP-GROSSING FILMS MADE IN THE U.K.

A total of 16 top-grossing projects released in 2018 were shot in the U.K., representing 43.2 percent of the total 37 films. These include *Annihilation*, *Bohemian Rhapsody*, *The Commuter*, *Darkest Hour* (2017), *Fantastic Beasts: The Crimes of Grindelwald*, *Holmes and Watson*, *Jurassic World: Fallen Kingdom*, *Mamma Mia! Here We Go Again*, *Mary Poppins Returns*, *The Nutcracker and the Four Realms*, *Overlord*, *Paddington 2*, *Phantom Thread*, *Ready Player One*, *Solo: A Star Wars Journey*, and *Star Wars: The Last Jedi* (2017).

The U.K.'s percentage capture of top-grossing films is higher than California and New York's at 17.7 and 12.2 percent, respectively.

FILM TAX CREDIT PROGRAM IN THE U.K.

Unlike its two U.S. competitors, the U.K. offers an uncapped cash rebate of 25 percent to qualifying productions. The U.K.'s Film Tax Relief program applies to above-the-line talent and back-end profit participation deals. These factors make it attractive to producers throughout the world. In addition, nations and regions in the U.K. offer their own incentives, which can be combined with the U.K.-wide incentive program.

AVAILABLE STAGE SPACE IN THE U.K.

According to secondary sources such as trade journals and U.S. newspapers, several studio projects have been announced in the past few years. The most recently announced project is a studio with the backing of Comcast® and NBCUniversal in Elstree, England, that would be on a similar scale to Pinewood and Shepperton.³⁹ This is in addition to announced expansions at the U.K.'s two major facilities—Pinewood Shepperton and Pinewood—as well as Twickenham Studios in England. In Northern Ireland, both Ardmore and Belfast Harbour studios have also announced expansion plans.

The planned and proposed increase in stage space would add to the region's existing 3.5 million square feet of dedicated stage space.⁴⁰ These specs on these proposed studio projects are hard to quantify at this time. However, any significant increase in supply would put the U.K. in a strategic position to attract more film and television productions, making it an even more significant competitor to both California and New York. The U.K. also has 32 stages in excess of 30,000 square feet, which is the highest number among the competitive set. Many of these stages are adaptive reuses of large-scale industrial facilities.

38 British Film Institute. Screen Sector Certification and Production. p. 15.
<https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-screen-sector-certification-and-production-bfi-2018-09-03.pdf>

39 Georg Szalai, "Comcast's Sky Developing 14-Stage Studio Complex North of London," *The Hollywood Reporter*. December 2, 2019.
<https://www.hollywoodreporter.com/news/comcasts-sky-developing-14-stage-studio-complex-north-london-1259094>

40 The British Film Commission.
<http://britishfilmcommission.org.uk/plan-your-production/studios/>

GEORGIA

The state of Georgia was the filming location for 36 films—12.4 percent of narrative features released in 2018—and three original streaming movies. As the third largest production center in the U.S., film and television productions spent \$2.7 billion in Georgia in 2018.⁴¹

Based on secondary data sources, among the 36 features that were filmed in the state, nineteen features were shot exclusively in Georgia (52.7 percent). Atlanta is the primary filming location in the state.

TOP-GROSSING FILMS MADE IN GEORGIA

Last year, Georgia was the primary filming destination for 22 of the top-grossing films, which is the highest number among the competitive set. This equates to approximately 61.1 percent of the 2018 releases that filmed in the state, meaning that the majority of features filmed in the Peach state are higher-budget projects. Georgia hosted a higher number top-grossing films than the U.K., California and New York.

These top-grossing projects include *Ant-Man and the Wasp*, *Avengers: Infinity War*, *Black Panther*, *Blockers*, *Den of Thieves*, *First Man*, *Game Night*, *Goosebumps 2: Haunted Halloween*, *The Hate U Give*, *The House with a Clock in the Walls*, *I, Tonya* (2017), *Instant Family*, *Life of the Party*, *Love, Simon*, *The Mule*, *Night School*, *Nobody's Fool*, *Pitch Perfect 3* (2017), *Tag*, *Tyler Perry's Acrimony*, *Uncle Drew*, and *Venom*.

FILM TAX CREDIT IN GEORGIA

Georgia established a film incentive program in 2005, with revisions in 2008. With an uncapped, transferable tax credit at 20 percent (plus a 10 percent bonus if the Georgia state logo is included in the final product), the state tax credit also applies to above-the-line talent.

AVAILABLE STAGE SPACE IN GEORGIA

Due to tremendous growth in the film and television industry, Georgia has approximately 2 million square feet of stage space.⁴² The state has some of the largest studio facilities in the U.S., including Pinewood Atlanta with 18 stages and 361,000 square feet.⁴³ Tyler Perry also opened Phase I of a new, 12-stage studio in late 2019 with 228,500 square feet on 330 acres of the former Fort McPherson base.

In 2017, AMC® purchased the nearly 80,000-square-foot Riverwood Studios where they film their television series, *The Walking Dead*.

41 Jessica Szilagyi, "Governor's Office: Ga Saw Record Year for Global Commerce and Film," *AllOnGeorgia*. September 11, 2019. <https://allongeorgia.com/georgia-business/governors-office-ga-saw-record-year-for-global-commerce-and-film/>

42 FilmGeorgia. <https://filmgeorgia.com/business/locations/studios-and-stages/>

43 Andreas Wiseman. "Pinewood Sells Stake in Atlanta Studios After Six Year Run." *Deadline*, August 21, 2019. <https://deadline.com/2019/08/pinewood-atlanta-studios-sale-avengers-endgame-spiderman-1202700493/>



CANADA

In the 1990s, Canada emerged as a low-cost global production center attracting a variety of international film and television projects. With its proximity to the U.S., combination of federal and provincial-level incentives, skilled crew base and breadth of infrastructure, Canada has been a top filming destination for several decades.

According to the Canadian Media Producers Association, the number of foreign features shot in the three major provinces—British Columbia, Ontario and Quebec—decreased by 5.3 percent between 2017 and 2018. Conversely, the number of foreign television series increased by 53.9 percent.⁴⁴ This also underscores the trend among the major production centers wherein television and feature film producers are competing for the same resources.

Among the 2018 releases shot in Canada, British Columbia/Vancouver was the most popular destination hosting 16 films (72.7 percent), followed by Ontario/Toronto with four films (*Kin*, *Every Day*, *The Shape of Water* (2017), *A Simple Favor*). Quebec was the filming destination for two U.S. films—*Death Wish* and *On the Basis of Sex*.

TOP-GROSSING FILMS MADE IN CANADA

A total of 11 top-grossing films were primarily filmed in Canada, representing 47.8 percent of features that shot in the country. Eight of these 2018 releases—50 percent—filmed in British Columbia/Vancouver. The projects include *Alpha*, *Bad Times at the El Royale*, *Deadpool 2*, *Fifty Shades Freed*, *Maze Runner: The Death Cure*, *Overboard*, *Skyscraper* and *The Predator*.

Top-grossing projects that shot in Ontario include *A Simple Favor* and *The Shape of Water* (2017). *Death Wish* was filmed in Quebec/Montreal.

AVAILABLE STAGE SPACE IN CANADA

The largest concentration of studio space (by square footage) is located in Ontario and British Columbia at 2.3 and 2.5 million square feet, respectively.^{45,46,47} The province of Montreal offers an additional 689,000 square feet. There are also several small facilities in the provinces of Saskatchewan and Manitoba, bringing the nation's total to roughly 5 million square feet.

Planned and proposed studio developments have been active in the province of Ontario. A total of four studio projects and an additional 865,000 square feet of space have been proposed. A 200,000-square-foot expansion is also underway at Pinewood Toronto. The project was announced in October 2018 and, upon completion, would make it Canada's largest studio facility.⁴⁸

Other developments in Ontario include Netflix signing long-term leases at Cinespace and Pinewood Studios. The CBS Corp.[®] also opened their CBS Stages Canada facility with six stages near Toronto in September 2019, which marks the first time that a "branded production entity" by a major U.S. media company opened in the country.⁴⁹

In British Columbia, Martini Film Studios recently announced an expansion that would grow its footprint from 250,000 to 850,000 square feet, with at least 450,000 square feet dedicated to sound stages.⁵⁰

44 Canadian Media Producer's Association: Profile 2018, p.59.

45 Ontario Film Commission.
<http://digitallibrary.ontariocreates.ca/DigitalLibrary/ProductionGuide/ProductionGuideSearchResult.aspx>

46 CreativeBC, *Impact Report: 2018-19*, p. 6.
<https://drive.google.com/file/d/1i36EIDXQZmF4yG91lkSMAJ6MAUGEiIT/view>

47 NOTE: Per Creative BC, there is a total of 2.5 million square feet of studio space in British Columbia, however, 800,000 is not available, meaning the province has 1.7 million that is currently available.

48 "Pinewood Toronto Studios Breaks Ground on 200,000 Square Foot Expansion," October 19, 2018.
<https://www.bellmedia.ca/the-lede/press/pinewood-toronto-studios-breaks-ground-on-200000-square-foot-expansion/>

49 Etan Vlessing, "CBS Launches Branded Stages Canada Studio in Toronto," *The Hollywood Reporter*, September 26, 2019.
<https://www.hollywoodreporter.com/news/cbs-launches-branded-cbs-stages-canada-studio-toronto-1243778>

50 Etan Vlessing, "Toronto: Vancouver Production Hub Unveils Massive Expansion," *The Hollywood Reporter*, September 7, 2019.
<https://www.hollywoodreporter.com/news/toronto-netflix-vancouver-production-hub-unveils-massive-expansion-1237696>

CONCLUSION

Based on FilmLA's research of the 291 narrative feature films and 56 streaming films released in 2018, California and New York were the most frequent filming jurisdictions. However, Georgia, the U.K. and Canada attracted a proportionately higher percentage top-grossing projects.

By our count, nearly three-quarters (73 percent) of all theatrical and streaming projects were filmed, either entirely or partially, in the top five production centers. What these filming centers possess is an attractive combination of incentives, crew base and infrastructure.

The California Film & TV Tax Credit ("CFTTC") has helped approximately 20 percent of the feature films released in 2018 stay in California. Two of the 11 streaming movies—18.1 percent—that filmed in California were also recipients of the CFTTC. These projects were evenly split between indie and non-indie films. This indicates that the program is capturing projects with more varied budgets. In addition, seven of these 12 movies also made the list of top-grossing films.

Combined, these 14 projects had significant economic benefits, generating \$414.1 million in qualified spending 645 Shoot Days, and employed 2,335 crew, 1,048 cast and 25,249 man days for extras. Only five of these projects were shot entirely in Los Angeles County, which is also indicative of the spillover effects from demand, in addition to the impact of the CFTTC's regional bonus.

With the advent of the streaming era, the amount of content being filmed does not appear to be declining, at least in the near term. Anecdotal conversations with film commissioners in each of the top production centers would indicate that all studio facilities are running at or near capacity, primarily with television projects. Therefore, as features and television projects face a contraction of available studio space within the major production centers, the challenge for them will be to keep up with the increasing demand by either building or acquiring new stages.

PHOTO: *A Wrinkle In Time* / Disney®



SOURCES

Annual Film Incentive Transparency Reports:

California Film Commission
CreativeBC
Georgia - Department of Economic Development
H&M Revenues and Customs
New York – Empire State Development Corporation
Ontario Creates

Online Databases:

IMDbPro
The Numbers®
StudioSystem

California Film Commissions:

California Film Commission
El Dorado Lake Tahoe Film & Media Office
Kern County Film Commission
Humboldt-Del Norte Film Commission
Long Beach Special Events and Filming
Lucerne Valley, California Film Site Permits
Monterey County Film Commission
Oakland Film Office
Riverside County Film Commission
San Bernardino County Film Office
San Diego Film Office
San Francisco Film Commission – Film SF
Santa Clarita Film Office – Film Santa Clarita

Other International:

British Film Institute
Canadian Media Producers Association: Profile 2018
Association of Film Commissioners International:
Best Practice in Screen Sector Development, 2019

Other Reports:

Motion Picture Association: 2018 Theme Report






2018: FILMS SHOT ENTIRELY IN CALIFORNIA (APPENDIX A)

PROJECT TITLE	CALIFORNIA LOCATIONS	STORY SETTING	CA SHOOT DAYS*	CREW MEMBERS	CAST MEMBERS	EXTRAS
<i>Altered Perception</i>	Los Angeles County	Not specific				
<i>Anything</i>	Los Angeles County	Los Angeles (Hollywood)	11	50	5	
<i>Beautiful Boy*</i>	Marin County Los Angeles County Sonoma County	San Francisco	42	175	61	1,622
<i>Blindspotting</i>	Alameda County	Oakland	30			
<i>Book Club*</i>	Los Angeles County	Not specific	40	150	29	4,400
<i>Breaking In</i>	Los Angeles County	Not specific	15	70	5	5
<i>Bumblebee*</i>	Inyo County Los Angeles County Marin County Mono County San Francisco County Santa Cruz County Solano County	Planet Cybertron California (earth)"	73	250	50	1,668
<i>Destroyer*</i>	Los Angeles County	Los Angeles	45	130	33	878
<i>Dog Days</i>	Los Angeles County	Los Angeles	12	80	5	35
<i>The Endless</i>	San Diego County	Southern California				
<i>An Evening with Beverly Luff Linn</i>	Humboldt County	Not specific	22			
<i>The Female Brain</i>	Los Angeles County	Not specific	4	45	10	10
<i>Flower</i>	Los Angeles County	Los Angeles	17	30	4	
<i>Future World</i>	Los Angeles County Riverside County	Desert oasis	9			
<i>Gemini</i>	Los Angeles County	Los Angeles				
<i>The Happys</i>	Los Angeles County	Los Angeles	2	25	2	1
<i>Happytime Murders*</i>	Los Angeles County	Los Angeles	20	100	10	4
<i>Hotel Artemis*</i>	Los Angeles County (Los Angeles Center Studios)	Los Angeles	40	110	15	735
<i>In Echo Park</i>	Los Angeles County	Los Angeles	5	17	5	
<i>Insidious: The Last Key</i>	Los Angeles County	California	24			
<i>Mid90s</i>	Los Angeles County	Los Angeles	30			
<i>Never Heard</i>	Los Angeles County	Los Angeles				
<i>Nostalgia</i>	Los Angeles County	Not specific	8			
<i>Peppermint*</i>	Los Angeles County	Los Angeles	50	120	210	2,500
<i>Please Stand By</i>	Los Angeles County San Francisco County	Oakland	14	80	10	
<i>Searching</i>	San Jose County	San Jose	13			
<i>Sorry to Bother You</i>	Alameda County	Oakland	26			
<i>Spinning Man</i>	Los Angeles County	Not specific	13	80	10	
<i>A Star is Born*</i>	Los Angeles County Riverside County	Los Angeles	45	139	35	2,725
<i>Traffik</i>	El Dorado County Ventura County	Sacramento	24			
<i>Unbroken: The Path to Redemption*</i>	Los Angeles County San Bernardino County Ventura County	Los Angeles, CA	25	112	24	75
<i>Vice*</i>	Los Angeles County Kern County San Bernardino County Ventura County	Wyoming Washington, D.C.	39	140	49	3,330
Average			25	100	30	1,285

2018: FILMS SHOT IN CALIFORNIA AND OTHER LOCATIONS (APPENDIX B)

PROJECT TITLE	NON-CALIFORNIA LOCATIONS	STORY SETTING	CA SHOOT DAYS
<i>12 Strong</i>	New Mexico	Afghanistan	4
<i>The 15:17 to Paris</i>	Georgia, Belgium, Italy, Netherlands	France	1
<i>A-X-L</i>	Argentina, Australia, Mexico, U.K.	Not Specific	4
<i>All About Nina</i>	New York	Los Angeles	
<i>Alpha</i>	Alberta (CA), British Columbia (CA), Iceland	Pre-historic times	5
<i>American Dresser</i>	New York, South Dakota	Road trip movie	
<i>Ant-Man and the Wasp</i>	Georgia	Not defined	18
<i>Bad Times at the El Royale</i>	British Columbia (CA)	Lake Tahoe	
<i>Best F(r)iends: Volume 1</i>	Nevada	Los Angeles	
<i>Blockers</i> (re-shoots)	Georgia	Chicago, IL	1
<i>Blumhouse's Truth or Dare</i>	Mexico	Mexico	14
<i>Death House</i>	Pennsylvania	Secret prison in unnamed location	
<i>Don't Worry He Won't Get Far on Foot*</i>	Oregon	Portland, OR	25
<i>God Bless the Broken Road</i>	Michigan	Not Specific	1
<i>Gringo</i>	Illinois, Mexico	Chicago/Mexico	
<i>Indivisible</i>	Tennessee	Fort Stewart, GA Iraq	10
<i>Kickboxer: Retaliation</i>	Nevada, Thailand	Las Vegas Thailand"	
<i>Jumanji: Welcome to the Jungle</i>	Georgia, Hawaii	New Hampshire Jungle setting	1
<i>Kings</i>	Belgium	South Central Los Angeles	7
<i>Never Goin' Back</i>	Texas	Southern Texas	
<i>The Nun</i> (re-shoots)	Romania	Romania	1
<i>Ocean's 8</i>	New York	New York City, NY	8
<i>Oh, Lucy!</i>	Japan	Tokyo & Los Angeles	1
<i>Primal Rage: The Legend of Konga</i>	Oregon	Forest of Pacific NW	30
<i>A Quiet Place</i> (re-shoots)	New York	Post Apocalyptic	2
<i>Rampage</i>	Georgia, Illinois	San Diego, CA	4
<i>Shine</i>	New York	New York City, NY	
<i>Venom</i>	Georgia, New York	San Francisco, CA Malaysia	18
<i>Winchester</i>	Australia	Outside San Francisco	3
<i>A Wrinkle in Time</i>	New Zealand	Three planets	80

PRIMARY FILMING LOCATIONS FOR TOP-GROSSING FEATURES (APPENDIX C)

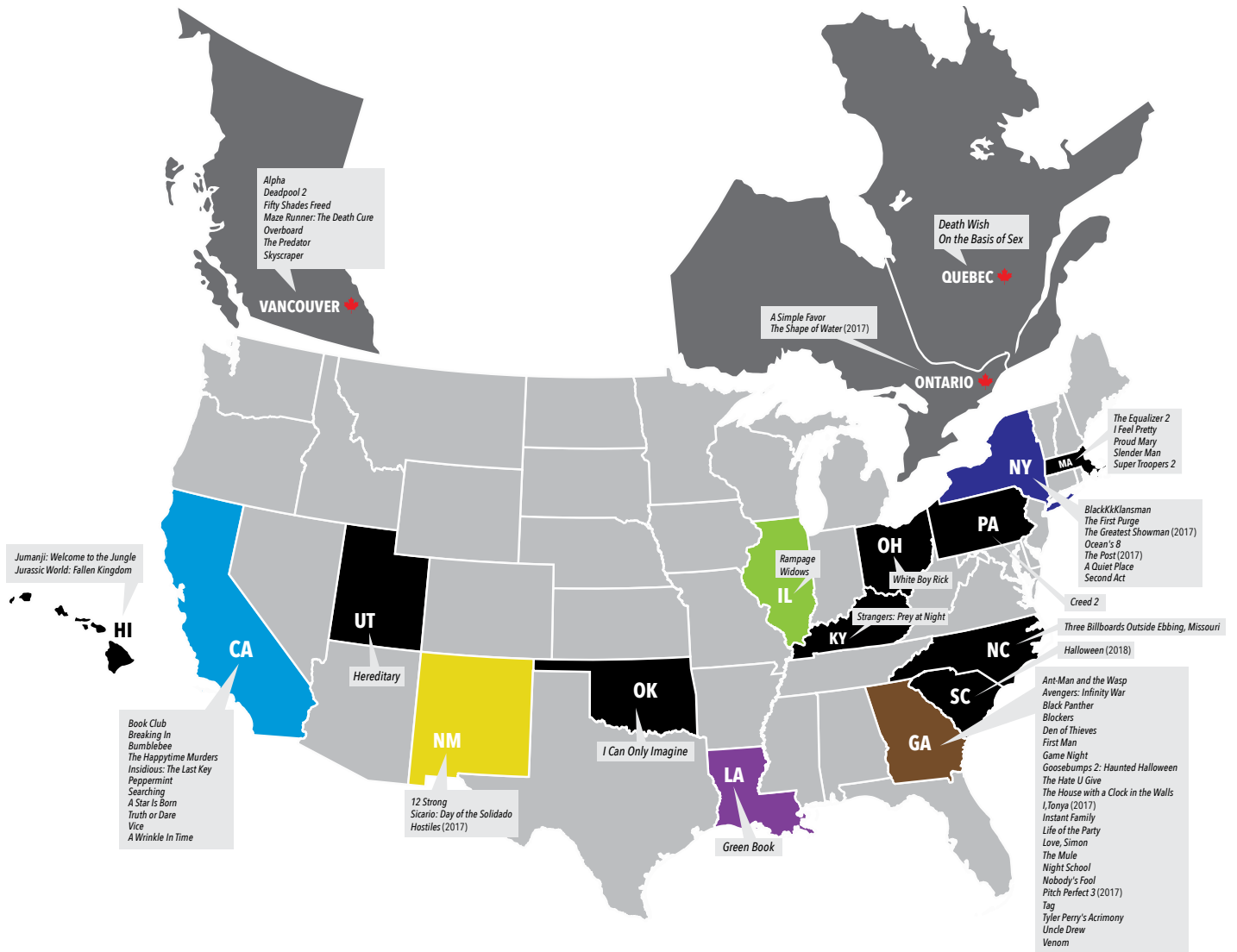
PRODUCTION CENTER	2018	2017	2016	2015	2014	2013
 Georgia	22	15	17	11	8	9
 U.K.	16	15	16	15	12	9
 California	11	6	7	12	16	12
 Canada	11	16	10	10	7	14
 New York	7	6	6	7	12	4
Massachusetts	5	n/a	n/a	n/a	n/a	n/a
Australia	3	3	4	1	1	2
Louisiana	1	5	6	9	6	15

NOTE: Data from previous years has been changed to exclude animation.



VISUAL MAP OF TOP-GROSSING FILMS OF 2018 (APPENDIX D):

NORTH AMERICA



MISC. INTERNATIONAL LOCATIONS

UK

Annihilation
Bohemian Rhapsody
The Commuter
Darkest Hour (2017)
Fantastic Beasts: The Crimes of Grindelwald
Holmes and Watson
Jurassic World: Fallen Kingdom
Mamma Mia! Here We Go Again
Mary Poppins Returns
The Nutcracker and the Four Realms
Overlord
Paddington 2

Phantom Thread
Ready Player One
Solo: A Star Wars Journey
Star Wars: the Last Jedi (2017)

FRANCE

Mission Impossible: Fallout

ITALY

The 15:17 to Paris

HUNGARY

Red Sparrow
Robin Hood
The Spy Who Dumped Me

ROMANIA

The Nun

COLOMBIA

Mile 22

AUSTRALIA

Aquaman
Pacific Rim Uprising
Winchester

NEW ZEALAND

The Meg

FIJI

Adrift

SOUTH AFRICA

Tomb Raider

SINGAPORE

Crazy Rich Asians

CALIFORNIA FILM & TV TAX CREDIT RECIPIENTS (APPENDIX E)

THEATRICAL FILMS IN 2018

PROJECT TITLE	CALIFORNIA LOCATIONS	EST. QUALIFIED SPEND	STORY SETTING	SHOOT DAYS	CREW MEMBERS	CAST MEMBERS	EXTRAS
<i>Beautiful Boy</i>	San Francisco Marin County Sonoma Los Angeles San Bernardino	\$19,326,000	San Francisco / Marin County	42	175	61	1,622
<i>Book Club</i>	Santa Clarita Arcadia Studio City Sylmar Encino Los Angeles Beverly Hills Sylmar	\$14,127,000	Los Angeles	40	150	29	4,400
<i>Bumblebee</i>	Mare Island, Vallejo Marin Headlands San Rafael Santa Cruz Golden Gate NRA Mount Tamalpais Vallejo Davenport Sausalito Felton Los Angeles Long Beach Studio City Simi Valley Pasadena Lancaster Bishop	\$102,458,000	Planet Cybertron / California (earth)	73	250	50	1,668
<i>Destroyer</i>	Los Angeles Culver City Inglewood Malibu Burbank Sun Valley Simi Valley Chatsworth West Covina Palmdale Whitewater Cathedral City	\$12,391,000	Los Angeles	45	130	33	878
<i>Don't Worry He Won't Get Far on Foot</i>	San Pedro West Adams Inglewood Pomona West Covina	\$5,423,000	Portland, OR	25	75	75	875
<i>The Happytime Murders</i>	Los Angeles Santa Clarita Burbank Canoga Park	\$18,507,000	Los Angeles	44	216	136	1,147
<i>Hotel Artemis</i>	Los Angeles Center Studios Santa Monica	\$15,496,000	Los Angeles	40	110	15	735

CONTINUED ON NEXT PAGE...

CALIFORNIA FILM & TV TAX CREDIT RECIPIENTS (APPENDIX E) (CONTINUED)

THEATRICAL FILMS IN 2018

PROJECT TITLE	CALIFORNIA LOCATIONS	EST. QUALIFIED SPEND	STORY SETTING	SHOOT DAYS	CREW MEMBERS	CAST MEMBERS	EXTRAS
<i>Peppermint</i>	Los Angeles Long Beach Burbank Glendale Encino Altadena	\$22,825,000	Los Angeles	50	120	210	2,500
<i>A Star is Born</i>	Los Angeles Santa Clarita Palm Springs Indio	\$34,158,000	Los Angeles	45	135	39	2,725
<i>Unbroken: The Path to Redemption</i>	Universal Studios Oxnard Pomona Tujunga	\$4,920,000	Los Angeles	25	112	24	725
<i>Vice</i>	Santa Clarita Kern River Los Angeles Culver City Hawthorne Alhambra Arcadia Norwalk Whittier Monterrey Park Thousand Oaks Westlake Village Ontario	\$40,001,000	Wyoming Washington, D.C.	55	130	135	3,330
<i>A Wrinkle in Time</i>	Los Angeles Santa Clarita Studios Humboldt County	\$85,393,000	Three planets	80	350	28	2,800
TOTAL		\$375,025,000		564	1,953	835	23,405
AVERAGE		\$31,252,083		47	163	70	1,950





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